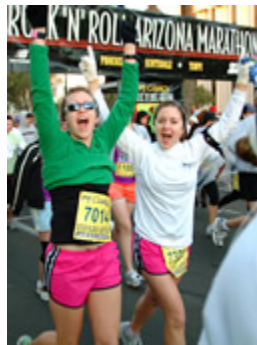


**P.F. CHANG'S ROCK 'N' ROLL ARIZONA MARATHON AND HALF
MARATHON 2007**



Prepared For:

The Arizona Office of Tourism



Prepared by:

**The Arizona Hospitality Research & Resource Center
Northern Arizona University**

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2007

EXECUTIVE SUMMARY:

The AHRRC at Northern Arizona University in conjunction with the Arizona Office of Tourism and Elite Racing conducted a follow-up survey of runners who participated in the PF Chang's Rock 'n' Roll Arizona Marathon and Half Marathon in Phoenix on January 14, 2007. From a database of more than 26,000 runners who registered for the race, AHRRC selected a random sample consisting of 9,000 runners who were surveyed by E-mail. Of 9,000 surveys sent, 1,944 were completed and returned for a response rate of 21.6 percent – providing a sample size with a 95 percent confidence level.

The following is a summary of the survey's major findings. Please refer to the complete results for each category in the full report that follows.

- More than half of runners (52.6%) were from out-of-state; 40.7% were from the greater Phoenix area (Maricopa/Pinal MSA); and the remaining 6.7% were from other Arizona communities outside the Phoenix MSA.
- The top five states of origin for out-of-state runners were: California, Illinois, Colorado, Wisconsin and Washington.
- Within the Maricopa County, the top communities contributing runners were: Phoenix (29.6%), Scottsdale 16.5%), Chandler (11.7%), Gilbert (7.7%), Mesa (7.7%) and Tempe (6.8%).
- Outside Maricopa County, top Arizona counties contributing runners were: Pima County (40.7%), Yavapai County (15.6%), Pinal County (14.4%) and Coconino County (10.2%).
- Average travel party size of race participants was 3.03 persons (skewed upwards by some very large parties), while the *median* for party size was 2.0 persons. Parties of three persons represented the single largest cohort at 34.3%, while two person parties represented 26.0% of the sample.
- Local runners had smaller average party sizes (2.2 persons), while out-of-state runners had the largest average party sizes at 3.6 persons.
- The mean for party size *participation in the race* (rather than just accompanying on the trip) was 2.5 persons.
- More runners competed in the half marathon (68.6%) than in the full marathon (31.4%).
- For the vast majority of respondents – 81.5% - attending the marathon was the primary reason for their trip.
- While one-third (32.8%) of respondents had attended a Rock n' Roll/Country Marathon before, two-thirds (67.2%) were first-time participants. Arizona (44.7%) and California (14.6%) contributed the largest percentages of *repeat* runners.

- Of first-time attendees, 85.4 percent indicated their willingness to participate in future marathons. Even more – 91.3% – said they would attend another marathon *in Phoenix* – evidence of very high satisfaction levels.
- The overall atmosphere of the race and the quality of the medals received the highest rating (mean 4.3), followed by the Health and Expo event (mean 4.1) and the event course and the availability of merchandise or souvenirs (mean 4.0).
- More respondents got their race information from friends and family (50.2%) than from any other source; the second most common source was attending other races (27.5%), followed by the Internet (19.7%) and specialized runners’ magazines (18.2%).
- The majority of respondents (47.7%) arrived in the Phoenix area by commercial airlines, followed by private vehicles (43.4%). The most used airline, by a wide margin, was Southwest (38.1%), followed by American (8.4%). Those who booked three airline seats comprised 40.8%, while those who booked two seats totaled 26.6%; 11.2% booked four seats.
- The top-three car rental companies used by race participants were: Hertz (23.8%), Avis (22.1%), and Budget (10.7%). The mean number of car rental days was 3.7 days and the average car rental expenditure was \$214.
- The largest percentage of respondents – 40.3% – stayed in their own home, followed by 40.2% who stayed in paid accommodations, and 19.5% who stayed with friends and relatives.
- Of paid lodging, more than three-fourths (85.2%) stayed in hotels and motels, while 11.4% stayed in resorts, and 4.2% in timeshares/condos.
- These lodging stays were spread across a number of communities; the top four were: Phoenix (19.7%), Tempe (11.1%), Scottsdale (10.6%), and “Other” (6.3%).
- Phoenix had the longest average length of stay (2.7 nights each), followed by Scottsdale (2.6 nights), Tempe (2.5 nights), and “Other” (3.0 nights). Phoenix had the highest average total lodging cost at \$415, followed by Scottsdale (\$397), and Tempe at \$359.
- Among other expenditures, the highest percentage of respondents reported expenditures for food and beverages (66%), followed by expenditures for the Health and Fitness Expo (60.7%), transportation (60.1%), shopping (51.9%), grocery stores (50.6%), entertainment & recreation (43.7%), and “other” purchases (34.0%).
- Average expenditures in each of these categories were: food & beverages (\$101), shopping (\$74), Health and Fitness Expo (\$67), “other” (\$58), transportation (\$49), entertainment/recreation (\$41), and grocery stores (\$27).
- Runners attending the marathon from out-of-state had the highest average expenditures in every category – with one logical exception, grocery store purchases.
- 21.1% of marathon respondents reported traveling outside the Phoenix Metro area during their stay. Sedona was the most frequently visited community (45.5%), followed by Tucson (28.4%). Native American Tribal lands accounted for 21.8%

of additional travel, while Flagstaff/Williams captured 18.5% of travel outside the Phoenix MSA.

- The most common activities participated in while traveling outside the Phoenix Metro area were: hiking/biking (38.9%), followed by “Other” (32.7%), visiting spas and resorts (23.3%). Other popular activities included: visiting art galleries and museums (22.1%); playing golf (14.5%); nature watching (10.6%); kids activities (10.3%); Native American arts and culture (9.1%); attending live dance, music, or theatre (8.8%) and Old West activities (7.7%).
- The average age of marathon respondents was 41 years old.
- Sixty three percent of respondents were male and 37% were female.
- Four-fifths (79.8%) graduated from a 4-year college.
- Average annual household income was \$90,452.
- The total estimated economic impact of the PF Chang’s Arizona Rock n’ Roll Marathon and Half Marathon – including direct, indirect and induced – was \$44 million contributing to the county economy and generating \$2.09 million in tax revenues.
- This level of spending would produce an employment impact of 1,230 jobs in the county economy.